

**Opportunities are the life blood
of a Refractive Medical Practice,
yet most Practice Management
Solutions do a poor job of
managing and following-up on
opportunities.**

Consult

Relationship Management Software Specifically designed for Medical Practices

- Lead Follow-up and Tracking
- Source and Cost per Lead / Cost per Surgery Tracking
- Personalized Letter and Email Templates
- Effective Sales Presentations with Financing Options
- Counselor Effectiveness Tracking with Close Rates
- Automated Credit Application Submission
- Track and Thank Referral Sources Automatically
- Powerful Phone Call Scripting Increases Follow-up Results



Consult - Pending Activities Screen

Recall Clear Edit Delete Print Call Letter EMail Exit

Activities For: 11/4/2008 Scheduled For: -ALL- Activity: Office: SUNRISE VAN NUYS Refresh

☒ Include All Prior Days

Priority	Client	Date	Time	Activity	Comment	Scheduled For	Scheduled By	Office
HIGH	MCINTYRE, REINE	11/04/2008	9:00 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	ANDERSON, MARYB	11/04/2008	9:30 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	JENKINS, WILLIAM	11/04/2008	9:45 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	JEAN MOODY	11/04/2008	10:00 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	SMITH, JOANIE	11/04/2008	10:00 AM	CONSULT	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	WILLIAMS, JOSEPH	11/04/2008	10:15 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	JONES, BILL	11/04/2008	11:00 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	ESPINOSA, ENRIQUI	11/04/2008	11:30 AM	SURGERY	LASIK	DKRIER	DKRIER	SUNRISE VAN
HIGH	HUGHES, ROBIN	11/04/2008	1:30 PM	SURGERY	ICL	DKRIER	DKRIER	SUNRISE VAN
MED	JONES, BILL	11/04/2008		PHONECALL	FOLLOW-UP NOT-SCHED	DKRIER	DKRIER	SUNRISE VAN
MED	ANDERSON, MARYB	11/04/2008		PHONECALL	INTERESTED IN BOTOX	MJACOBE	DKRIER	SUNRISE VAN
MED	JENKINS, WILLIAM	11/04/2008		PHONECALL	FOLLOW-UP NOT-SCHED	DKRIER	DKRIER	SUNRISE VAN
LOW	SMITH, BILL	11/04/2008		LETTER	THANK YOU FOR VISITING	DKRIER	DKRIER	SUNRISE VAN
LOW	JONES, JOHN	11/04/2008		LETTER	THANK YOU FOR VISITING	DKRIER	DKRIER	SUNRISE VAN
LOW	SMITH, MARY	11/04/2008		LETTER	REFERRAL THANK YOU	DKRIER	DKRIER	SUNRISE VAN

Records: 5

Each Day when you start **Consult** a list of that Day's Pending Tasks is displayed which can be completed directly from this screen

New Client	Recall Records	Find Client	Save Record	Client History	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
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Consult
by Patient Concepts

Client	<input type="text"/>	Gender	<input type="text"/>	Counselor	DAVID KRIER		
Address	<input type="text"/>				Office	SUNRISE VAN NUYS	
City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>	Doctor	DR. BILL JOHNSON
Phone Hm.	- -	Wk.	- - X	Cell	- -	Co-Managed	<input type="checkbox"/>
EEmail	<input type="text"/>	DOB	<input type="text"/>	Acct #	<input type="text"/>	Comment <input type="text"/>	
Category	LASIK	Status	INQUIRY	11/4/08 2:17 pm			
Discount	<input type="text"/>	Rate	\$ 0				
Cash Discount	3 %	Insurance	\$ 0				

Date Option 1	Date Option 2	Inquiry	Appt. Set	Consult	Schedule	Pre-Op	Surgery	Initial Date
<input type="text"/>	<input type="text"/>	11/04/2008	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	11/04/2008

Sources

Procedures

Presentation

Pending Activities

History / Notes

Outcome

Primary Source Source #2 Source #3

Consult Screen — SUNRISE LASER CENTERS (localhost)

File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History Place Call Incoming Call Sched. Activity Pending Tasks Quit

Consult
by Patient Concepts

Client JONES, MARY **Gender** Female

Address 235 MAPLE ST

City CAMARILLO **State** CA **Zip** 93010

Phone Hm. 888-555-1212 **Wk.** 888-555-1234 X **Cell** 888-555-2356

EMail mjones@someisp.net **DOB** 04/15/71 **Acct #** 1234567

Counselor DAVID KRIER

Office SUNRISE VAN NUYS

Doctor DR. BILL JOHNSON

Co-Managed

Category LASIK **Status** INQUIRY 11/4/08 2:17 pm

Discount **Rate** \$ 0 **Comment**

Cash Discount 3 % **Insurance** \$ 0

Date Option 1 **Date Option 2**

Initial Date 11/04/2008

Sources **Procedures** **Presentation** **Pending Activities** **History / Notes** **Outcome**

Primary Source

Source #2

Source #3

A minimum of input enters the important information needed for tracking and follow-up.

Consult Screen — SUNRISE LASER CENTERS (localhost)
File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History Place Call Incoming Call Sched. Activity Pending Tasks Quit

Consult
by Patient Concepts

Client JONES, MARY Gender Female Counselor DAVID KRIER
Address 235 MAPLE ST Office SUNRISE VAN NUYS
City CAMARILLO State CA Zip 93010 Doctor DR. BILL JOHNSON
Phone Hm. 888-555-1212 Wk. 888-555-1234 X Cell 888-555-2356 Co-Managed
EMail mjones@someisp.net DOB 04/15/71 Acct # 1234567

Category LASIK Status INQUIRY 11/4/08 2:17 pm
Discount NOVEMBER SPECIAL Rate 10 %
Cash Discount 3 % Insurance \$ 0

Date Option 1 Date Option 2 Inquiry Appt. Set Consult Schedule Pre-Op Surgery Initial Date
11/11/2008 11/13/2008 11/04/2008

Sources Procedures Presentation Pending Activities History / Notes Outcome

Next Step: Add Procedures

Primary Source DR REFERRAL
Detail DR. CHARLES
Source #2
Source #3

Type of Patient and any special Promotions can be quickly noted

Consult Screen — SUNRISE LASER CENTERS (localhost)
File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History Place Call Incoming Call Sched. Activity Pending Tasks Quit

Consult
by Patient Concepts

Client JONES, MARY Gender Female Counselor DAVID KRIER
Address 235 MAPLE ST Office SUNRISE VAN NUYS
City CAMARILLO State CA Zip 93010 Doctor DR. BILL JOHNSON
Phone Hm. 888-555-1234 Wk. 888-555-1234 X Cell 888-555-2356 Co-Managed
EMAIL mjones@someisp.net DOB 04/15/71 Acct # 1234567
Category LASIK Status INQUIRY
Discount NOVEMBER Insurance
Cash Discount 3%
Date Option 1 11/11/2008 Date Option 2 11/13/2008 Inquiry Appt. Set Consult Schedule Pre-Op Surgery Initial Date 11/04/2008

Sources Procedures Presentation Pending Activities History / Notes Outcome

Next Step: Add Procedures

Primary Source DR REFERRAL
Detail DR. CHARLES COOPER
Source #2
Source #3

Sourcing Opportunities is critical in determining the success of your marketing efforts. Consult lets you enter up to three different Sources



Automatically Generate Referral Thank You Letters

November 4, 2008

Dr. Charles Cooper
333 N Lantana St, Ste 136
Camarillo, CA 93010

Dear Dr. Charles Cooper,

I want to personally thank you for referring Mary Jones. We value your confidence in us and will do everything in our power to provide the positive experience that we know you expect.

If you have any questions or concerns, please feel free to contact either David [Name] at: 888-555-Lasik.

[Name],
[Name] of Van Nuys

[Name]
Centers

Consult - Add Source Detail Letter

Would you like to send the following letter to Dr. Charles Cooper?

REFERRAL THANK YOU



Yes



No

The Procedures Tab is used to specify the Procedures requested by the prospective Patient

Select / Add

The Presentation Tab provides customizable Finance alternatives. The "Web Credit App" button automatically fills in the Chase Credit Application



Sources

Procedures

Presentation

Pending Activities


History / Notes

Outcome

Next Step: Print Presentation 

Approval Status 

☒ Show Payments - Section #1

0% FINANCING UP TO 24 MONTHS 

Rate 0.00 %


Down %	Down \$	3 Months	6 Months	12 Months	24 Months
0 %	\$ 0	\$ 1,680	\$ 840	\$ 420	\$ 210
5 %	\$ 300	\$ 1,580	\$ 790	\$ 395	\$ 198
10 %	\$ 600	\$ 1,480	\$ 740	\$ 370	\$ 185
20 %	\$ 1,200	\$ 1,280	\$ 640	\$ 320	\$ 160

☒ Show Payments - Section #2

CHASE HEALTH ADVANCE FINANCING 

Rate 11.99 %

Down %	Down \$	24 Months	36 Months	48 Months
0 %	\$ 0	\$ 237	\$ 167	\$ 133
5 %	\$ 300	\$ 223	\$ 157	\$ 125
10 %	\$ 600	\$ 209	\$ 147	\$ 117
20 %	\$ 1,200	\$ 181	\$ 128	

 Web Credit App

Home

Services

Reports

Contact

My Account

News

HealthAdvance
Network

Logout

Online Application for Patient Financing

For use by practice office staff only.

If you have questions please call us toll-free at 1-888-519-6111.

APPLICANT INFORMATION

(or parent/guardian if applicant is a minor)

*Indicates Required Field

*First Name:

Mary

M.I.: *Last Name:

Jones

Suffix (jr., sr., etc.):

*Street Address:

235 Maple St

Apt/Suite:

*City:

Camarillo

*State:

California



*Zip Code:

93010

*SSN #:

-

-

*Date of Birth:

04

▼

-

15

▼

- 19

71

*Home Phone:

888

-

555

-

1212

Other Personal Phone:

888

-

555

-

2356

Consult Screen — SUNRISE LASER CENTERS (localhost)

File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History

Client JONES, MARY
Address 235 MAPLE ST

Phone 888-555-1234 Fax 888-555-1234

Date Option 1 11/11/2008 Date Option 2 11/13/2008 Inquiry 11/04/2008 Appt. Set

Sources Procedures Presenta

Next Step: Print Presentation

Show Payments - Section #1

0% FINANCING UP TO 24 MONTHS Rate

Down %	Down \$	3 Months	6 Months	12 Months	24 Months
0 %	\$ 0	\$ 1,680	\$ 840	\$ 420	
5 %	\$ 300	\$ 1,580	\$ 790	\$ 395	
10 %	\$ 600	\$ 1,480	\$ 740	\$ 370	
20 %	\$ 1,200	\$ 1,280	\$ 640	\$ 320	

A professional presentation with financing "Choices" improves close rates



SUNRISE LASIK OF VAN NUYS
23456 FIRST ST
VAN NUYS, CA 93000
888-555-LASIK

Specifically Prepared for:
Mary Jones
November 4, 2008 3:12 pm

DR. BILL JOHNSON
Counselor: DAVID KRIER

Description	Qty	Total
Custom LASIK Procedure Both Eyes	1	4,900.00
IntraLase® Both Eyes	1	700.00
LASIK Procedures Include: Pre Operative Care, Refractive Surgery, Post-operative medication FML, Post-operative exams for 1 year, Enhancement surgery during 1 year post-op, Temporary plugs for dry eyes		
Total		\$5,600.00
Less November Special		\$560.00
Net Client Investment		\$5,040.00

Date Preference: ☐ Tue 11/11/2008 ☐ Thu 11/13/2008 ☐

1 Credit Card / Debit Card / Finance Option \$5,040.00

2 Discount for Cash/Check (3% Discount = \$151.20) \$4,888.80

3 0% FINANCING UP TO 24 MONTHS						This example is based on 0% APR. Payments are estimates, your actual payment and interest rate may vary based upon credit history and finance source requirements. This information is provided strictly as an example of possible finance alternatives and is subject to finance source review and approval.
Down Payment	3 Months	6 Months	12 Months	24 Months		
\$0	\$1,680	\$840	\$420	\$210		
\$300	\$1,580	\$790	\$395	\$198		
\$600	\$1,480	\$740	\$370	\$185		
\$1,200	\$1,280	\$640	\$320	\$160		

4 CHASE HEALTH ADVANCE FINANCING						This example is based on 11.99% APR. Payments are estimates, your actual payment and interest rate may vary based upon credit history and finance source requirements. This information is provided strictly as an example of possible finance alternatives and is subject to finance source review and approval.
Down Payment	24 Months	36 Months	48 Months			
\$0	\$237	\$167	\$133			
\$300	\$223	\$157	\$125			
\$600	\$209	\$147	\$117			
\$1,200	\$181	\$128				

LASIK Procedures Exclude: Post Operative Anti biotic, Medical Conditions not related to Lasik, Post-operative medication Zymar (Lasik) or Acular LS (PRK), Post-operative exams past 1 year of surgery, Enhancement surgery past 1 year Post-op, Permanent Plugs

Client Signature: _____ Date: _____

Consult Screen — SUNRISE LASER CENTERS (localhost)

File Edit Letters Print Reports Setup Help Admin

New Client

Recall Records

Find Client

Save Record

Client History

Place Call

Incoming Call

Sched. Activity

Quit

Consult by Patient Concepts

Client JONES, MARY

Address 235 MAPLE ST

City CAMARILLO State CA Zip

Phone Hm. 888-555-1212 Wk. 888-555-1234 X

Email mjones@someisp.net DOB 04/15/71

Category LASIK Status INQUIRY

Discount NOVEMBER SPECIAL

Cash Discount 3%

Date Option 1 11/11/2008 Date Option 2 11/13/2008 Inquiry 11/04/2008 Appt. S

Next Step: Print Presentation

Show Payments - Section #1

0% FINANCING UP TO 24 MONTHS Rate

Down % Down \$ 3 Months 6 Months 12 Months 24

Consult - Activity Screen

Activity SURGERY Priority High

Regarding LASIK

Date 11/13/2008 Time 10:00 am

Duration (minutes)

Sched For DKRIER Sched By DKRIER

Comment

Save Cancel

November 2008

Su	Mo	Tu	W	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Today

Show All Pending Activities

Pending Activities for: Thursday 11/13/2008

Activity	Date	Time	Comment	Sched. By

Activities and future reminders are easily scheduled for Appointments, Consults, Surgery, Phone Follow-up, Reminders, etc.

Consult automatically asks if you want to schedule a Confirmation Call on the day before an Appointment. To increase show rates.

Consult - Confirmation Call

Would you like to add a confirmation call on:

Date: 11/12/2008
Wednesday

Time:

Script: APPOINTMENT CONFIRMATION CA

☒ Yes ☐ No

Consult - Call Center

Save/Next Save Cancel Letter Schedule Activity History

Client
JONES, MARY
235 MAPLE ST, CAMARILLO, CA, 93010

Phone
Home: 888-555-1212
Cell: 888-555-2356
Work: 888-555-1234 x

Procedures
LASIK: Custom LASIK Procedure Both Eyes, IntraLase® Both Eyes

Source: DR REFERRAL
Detail: DR. CHARLES COOPER
Discount: NOVEMBER SPECIAL - 10%

Total: \$5,040.00

APPOINTMENT CONFIRMATION CALL Show Script

Call Status

Note

Activity	Comment	Counselor	Date	Time	Completed	Status
SCRIPT CALL	APPOINTMENT CONFIRMA	DAVID KRIER	11/12/2008		11/04/2008 4:46 PM	
GREETING: Speaking SPEAKING: Confirm HAVE TRANSPORTATION: Yes NEED DIRECTIONS?: Yes QUESTIONS: No "Mary is bringing her sister Beth who is interested in LASIK"						
NOTE	STATUS CHANGED	DAVID KRIER	11/04/2008	4:39 PM	11/04/2008 4:39 PM	
STATUS CHANGED FROM: INQUIRY TO: SCHEDULED						

The Consult Call Center puts all of the critical information at your fingertips to help facilitate Phone Contact.

We can use the Script function in *Consult* to help make sure our people say the right things

✓ Save/Exit

✕ Cancel

🌐 Office Info

📅 Schedule Activity

📄 History

Name	JONES, MARY	Home	888-555-1212	Work	888-555-1234 x__	Primary Source	DR REFERRAL
Email	MJONES@SOMEISP.NET	Cell	888-555-2356	Type	LASIK	Source Detail	DR. CHARLES COOPER
LASIK: Custom LASIK Procedure Both Eyes, IntraLase® Both Eyes						Total: \$5,040.00	

QUESTION (Short)

- ▶ 1 GREETING
- 2 SPEAKING
- 3 HAVE TRANSPORTATION
- 4 NEED DIRECTIONS?
- 5 QUESTIONS
- 6 FINISH - NO APPT
- 7 FINISH - APPT
- 8 RESCHEDULE
- 9 LEAVE MESSAGE MACHINE
- 10 LEAVE MESSAGE PERSON
- 11 WHY US?
- 12 DOCTOR EXPERIENCE
- 13 NEWS STORY
- 14 PRICING QUESTIONS

QUESTION

**** SMILE **** SMILE **** SMILE ****

Good Afternoon, this is David Krier from Sunrise Lasik of Van Nuys.

May I please speak with Mary Jones?

**Powerful customizable scripts with
“merged” Patient information and
branching logic**

RESPONSE (Please select 1)

- | | |
|--|------------------------------------|
| <input checked="" type="checkbox"/> Speaking | <input type="checkbox"/> Not Here |
| <input type="checkbox"/> Voice Mail | <input type="checkbox"/> Wrong No. |
| <input type="checkbox"/> Busy | |

COMMENT

Consult - Call Center

Client
 JONES, MARY
 235 MAPLE ST, CAMARILLO, CA, 93010

Phone
 Home: 888-555-1212
 Cell: 888-555-2356
 Work: 888-555-1234 x

Procedures
 LASIK: Custom LASIK Procedure Both Eyes, IntraLase® Both Eyes

Source: DR REFERRAL
Detail: DR. CHARLES COOPER
Discount: NOVEMBER SPECIAL - 10%

Total: \$5,040.00

APPOINTMENT CONFIRMATION CALL

Call Status CALL COMPLETED
Call Result APPT CONFIRMED

Note

Activity	Comment	Counselor	Date	Time	Completed	Status
SCRIPT CALL	APPOINTMENT CONFIRMA	DAVID KRIER	11/12/2008		11/04/2008 4:46 PM	
GREETING: Speaking SPEAKING: Confirm HAVE TRANSPORTATION: Yes NEED DIRECTIONS?: Yes QUESTIONS: No "Mary is bringing her sister Beth who is interested in LASIK"						
NOTE	STATUS CHANGED	DAVID KRIER	11/04/2008	4:39 PM	11/04/2008 4:39 PM	
STATUS CHANGED FROM: INQUIRY TO: SCHEDULED						

This example shows the results of the Call at which point we can enter a Call Status and Call Result by selecting them from a drop down list

Consult Screen — SUNRISE LASER CENTERS (localhost)

File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History Place Call Incoming Call Sched. Activity Pending Tasks Quit

Consult
by Patient Concepts

Client **JONES, MARY** Gender Female Counselor DAVID KRIER

Address 235 MAPLE ST City CAMARILLO State CA Zip 93010

Phone Hm. 888-555-1212 Wk. 888-555-1212

E-Mail mjones@someisp.net

Category LASIK Status SCHEDULED

Discount NOVEMBER SPECIAL Rate 10 %

Cash Discount 3 % Insurance \$ 0

Date Option 1 11/11/2008 Date Option 2 11/13/2008 Inquiry 11/04/2008 Appt. Set 11/04/2008 Consult 11/04/2008 Schedule 11/04/2008 Pre-Op 11/04/2008 Surgery Initial Date 11/04/2008

The History / Notes Tab displays the information related to any Customer contact that has occurred

Sources Procedures Presentation Pending Activities **History / Notes** Outcome

Add Note Edit Delete

Activity	Comment	Counselor	Date	Time	Completed	Status	Result
SCRIPT CALL	APPOINTMENT CONFIRMAT	DAVID KRIER	11/12/2008		11/04/2008 4:53 PM	CALL COMPLETE	APPT CONFIRMED
GREETING: Speaking SPEAKING: Confirm HAVE TRANSPORTATION: Yes NEED DIRECTIONS?: Yes QUESTIONS: No "Mary is bringing her sister Beth who is interested in LASIK"							
NOTE	STATUS CHANGED	DAVID KRIER	11/04/2008	4:39 PM	11/04/2008 4:39 PM		
STATUS CHANGED FROM: INQUIRY TO: SCHEDULED							

COMPLETED ACTIVITIES REPORT - BY COUNSELOR
SUNRISE LASER CENTERS
 From 8/1/2008 To 9/18/2008

Counselor: DAVID KRIER

Completed Date	Client	Activity	Scheduled Date	Activity Status	Activity Result	Client Status
09/16/08 1:31 PM	JONES, JOHN	PHONECALL	08/04/2008	CALL COMPLETED	NO LONGER INTERESTED	INQUIRY
08/01/08 9:30 AM	JONES, DAVID	PHONECALL	08/01/2008	CALL COMPLETED	APPT CONFIRMED	SURGERY
08/04/08 10:22 AM	IRISH, STEVEN	PHONECALL	08/04/2008	CALL COMPLETED	APPT CONFIRMED	SURGERY
08/04/08 11:28 AM	BARNETT, JAMES B	PHONECALL	08/04/2008	CALL COMPLETED	APPT CONFIRMED	SURGERY
08/04/08 11:44 AM	GEORGE SMITH	PHONECALL	08/04/2008	INCOMING CALL		INQUIRY
08/04/08 12:55 PM	DAY, PAULA ANN	PHONECALL	08/04/2008	CALL COMPLETED	APPT CONFIRMED	SURGERY
08/22/08 8:54 AM	DAY, PAULA ANN	PHONECALL	08/06/2008	CALL COMPLETED	APPT CONFIRMED	SURGERY
08/04/08 1:00 PM	GEORGE JACOB	PHONECALL	08/04/2008	INCOMING CALL		INQUIRY
08/22/08 9:40 AM	MATTHEWS, JEROME J	PHONECALL	08/11/2008	CALL COMPLETED		
08/20/08 9:22 AM	ONUR BIRSEN	PHONECALL	08/20/2008	CALL COMPLETED		
08/20/08 4:31 PM	JEAN MOODY	PHONECALL	08/20/2008	CALL COMPLETED		
08/22/08 9:39 AM	REYNOLDS, MARY	PHONECALL	08/21/2008	CALL COMPLETED		
08/21/08 10:24 AM	JOHNSON, WILLIAM	PHONECALL	08/21/2008	CALL COMPLETED		
08/22/08 9:20 AM	GORRZEGZ, JORGE	PHONECALL	08/22/2008	CALL COMPLETED		
08/28/08 12:09 PM	HERNANDEZ, DEBBY	PHONECALL	08/28/2008	CALL COMPLETED		
08/29/08 11:48 AM	LONG, DIXIE	PHONECALL	08/29/2008	CALL COMPLETED		
08/29/08 12:06 PM	JONES, BILL	PHONECALL	08/09/2008	CALL COMPLETED		
09/05/08 1:05 PM	DUVALL, LYNNE	PHONECALL	09/05/2008	CALL COMPLETED		
Activity Type: PHONECALL 18 out of 18						
08/04/08 2:37 PM	MATTHEWS, JEROME J	PRE-OP	08/04/2008	KEEPED		
Activity Type: PRE-OP 1 out of 1						

Completed Activities Report

LEAD COST ANALYSIS REPORT
SUNRISE LASER CENTERS
 From 8/1/2008 To 9/18/2008

* When there are multiple sources for a particular Client they are allocated (two sources are allocated as .60 and .40 - three sources are allocated as .50, .25 and .25). In either case the first source is considered primary and has the larger weighting.

Source: MONEY MAILER

Leads	Date	Client	Category	Source	Status	Doctor	Office	Counselor
0.40	08/04/08	IRISH, STEVEN	LASIK	MONEY MAILER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
0.60	08/04/08	BARNETT, JAMES B	LASIK	MONEY MAILER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
0.40	08/28/08	HERNANDEZ, DEBBY	LASIK	MONEY MAILER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
0.40	08/29/08	LONG, DIXIE	LASIK	MONEY MAILER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
0.40	09/05/08	DUVALL, LYNNE	LASIK	MONEY MAILER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER

Source: MONEY MAILER

Pro-Rated Amt: \$4,000.00

Per Lead: 2.20 @ \$1,818.18

Per Surgery: 1.40 @ \$2,857.14

Source: RSVP MAILER

Leads	Date	Client	Category	Source	Status	Doctor	Office	Counselor
1.00	08/01/08	GOMEZ, ANDY	LASIK	RSVP MAILER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
1.00	08/01/08	GOMEZ, WILLIAM	LASIK	RSVP MAILER	INQUIRY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
1.00	08/01/08	GORRZEGZ, JORGE	LASIK	RSVP MAILER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER

Pro-Rated Amt: \$400.00

Per Lead: 2.40 @ \$166.67

Per Surgery: 1.40 @ \$285.71

Source: WESTLAKE MAGAZINE

Leads	Date	Client	Category	Source	Status	Doctor	Office	Counselor
1.00	08/04/08	MATTHEWS, JEROME J	LASIK	WESTLAKE MAGAZINE	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER
0.40	08/20/08	ONUR BIRSEN	LASIK	WESTLAKE MAGAZINE	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NUYS	DAVID KRIER

Lead Cost Analysis Report

Reports zero in on what's happening with your opportunities

CONVERSION REPORT - BY COUNSELOR
SUNRISE LASER CENTERS
From 8/1/2008 To 9/18/2008

Counselor: DAVID KRIER

Date	Client	Category	Source	Source Detail	Status	Doctor	Office	Counselor
08/01/2008	JONES, DAVID	LASIK	DR REFERRAL	DR. CHARLES COOPER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/01/2008	GOMEZ, ANDY	LASIK	RSVP MAILER		SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/01/2008	GOMEZ, WILLIAM	LASIK	RSVP MAILER		INQUIRY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008	MATTHEWS, JEROME J	LASIK	WESTLAKE MAGAZINE		SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008	IRISH, STEVEN	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008	BARNETT, JAMES B	LASIK	MONEY MAILER		SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008	GEORGE SMITH	LASIK	CLIPPER MAGAZINE		INQUIRY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008	DAY, PAULA ANN	LASIK	PATIENT REFERRAL	SMITH, BILL	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER

08/20/2008	ONUR BIRSEN	LASIK	DR REFERRAL	DR. CHARLES COOPER				
08/20/2008	JEAN MOODY	LASIK	DR REFERRAL	DR. ANDREW ANDERSON				
08/21/2008	JOHNSON, WILLIAM	LASIK	DR REFERRAL	DR. ANDREW ANDERSON				
08/21/2008	DYLAN KEMNA	LASIK	WEB SEARCH	GOOGLE				
08/22/2008	GORRZEGZ, JORGE	LASIK	DR REFERRAL	DR. ANDREW ANDERSON				
08/28/2008	HERNANDEZ, DEBBY	LASIK	DR REFERRAL	DR. CHARLES COOPER				
08/29/2008	LONG, DIXIE	LASIK	DR REFERRAL	DR. ANDREW ANDERSON				
08/29/2008	JONES, BILL	LASIK	CLIPPER MAGAZINE					
08/05/2008	DUVALL, LYNNE	LASIK	DR REFERRAL	DR. CHARLES COOPER				
09/18/2008	SMITH, JOANIE	IOL	WESTLAKE MAGAZINE					

DAVID KRIER Inquiries: 18 Consults: 14 Surgeries: 9

Counselor: MARSHALL JACOB

Date	Client	Category	Source	Source Detail
09/18/2008	MCINTYRE, REINE	LASIK	DR REFERRAL	DR. CHARLES COOPER

Conversion Report

SOURCE REPORT - BY SOURCE
SUNRISE LASER CENTERS
From 8/1/2008 To 9/18/2008

Source: CLIPPER MAGAZINE

Date/Time	Client	Category	Source	Source Detail	Status	Doctor	Office	Counselor
08/04/2008 11:44 AM	GEORGE SMITH	LASIK	CLIPPER MAGAZINE		INQUIRY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/04/2008 12:40 PM	DAY, PAULA ANN	LASIK	CLIPPER MAGAZINE		SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/29/2008 11:54 AM	JONES, BILL	LASIK	CLIPPER MAGAZINE		APPOINTMENT	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER

Total For Detail: 2.40 out of 2.40

Total For Source: CLIPPER MAGAZINE 2.40 out of 19 10.5 %

Source: DR REFERRAL

Date/Time	Client	Category	Source	Source Detail	Status	Doctor	Office	Counselor
08/04/2008 10:06 AM	IRISH, STEVEN	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/20/2008 04:13 PM	JEAN MOODY	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/21/2008 10:11 AM	JOHNSON, WILLIAM	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/22/2008 09:01 AM	GORRZEGZ, JORGE	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/29/2008 11:35 AM	LONG, DIXIE	LASIK	DR REFERRAL	DR. ANDREW ANDERSON	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER

Total For Detail: DR. ANDREW ANDERSON 3.00 out of 6.00

08/01/2008 09:03 AM	JONES, DAVID	LASIK	DR REFERRAL	DR. CHARLES COOPER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/20/2008 09:09 AM	ONUR BIRSEN	LASIK	DR REFERRAL	DR. CHARLES COOPER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/28/2008 11:47 AM	HERNANDEZ, DEBBY	LASIK	DR REFERRAL	DR. CHARLES COOPER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
08/05/2008 12:51 PM	DUVALL, LYNNE	LASIK	DR REFERRAL	DR. CHARLES COOPER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NU	DAVID KRIER
09/18/2008 11:23 AM	MCINTYRE, REINE	LASIK	DR REFERRAL	DR. CHARLES COOPER	SCHEDULED	DR. BILL JOHNSON	SUNRISE VAN NU	MARSHALL JACOB

Total For Detail: DR. CHARLES COOPER 3.00 out of 6.00

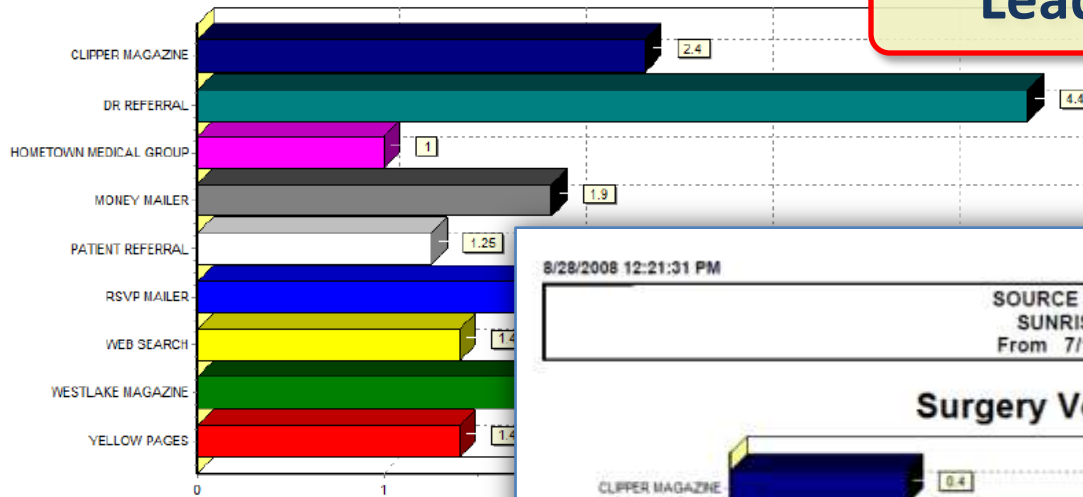
Total For Source: DR REFERRAL 6.00 out of 19 31.6 %

Lead Source Report

Source: MONEY MAILER

SOURCE REPORT - BY SOURCE
SUNRISE LASER CENTERS
From 7/1/2008 To 8/31/2008

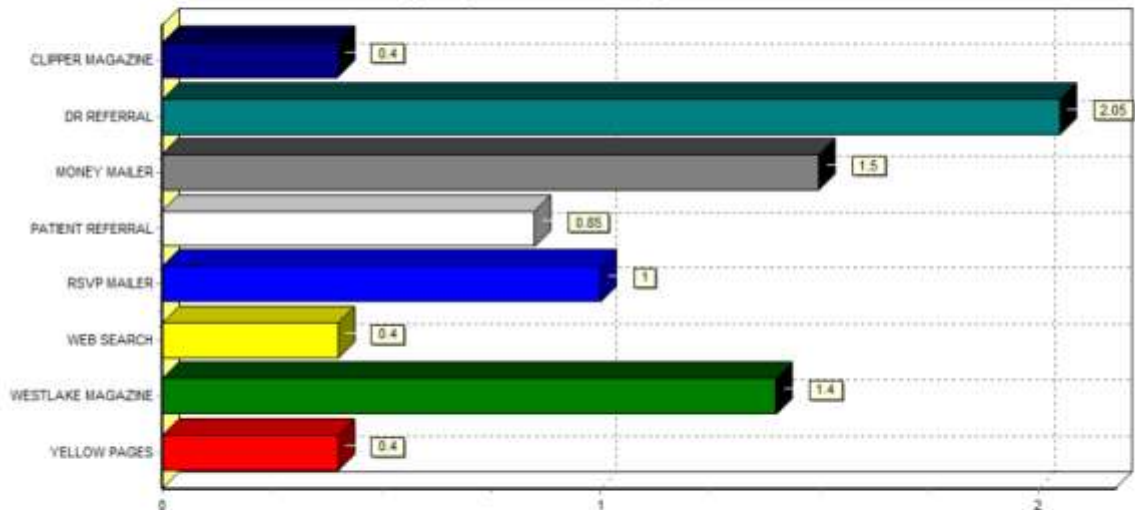
Lead Volume by Source



Lead Volume by Source

SOURCE REPORT - BY SOURCE
SUNRISE LASER CENTERS
From 7/1/2008 To 8/31/2008

Surgery Volume by Source



Surgery Volume by Source

“We introduced a lower price point for standard LASIK and were able to send a letter and setup a phone call for all of our non-scheduled Consults from the last 6 months and it took us only 30 minutes”

Refractive Practice – Montgomery, AL

“We started using the Consult software and LOVE it!”

Refractive Practice – Rapid City, SD

“We love what this program can do and everyone is really working at being consistent.”

Refractive Practice – Orem, UT

“We’ve been able to up-sell Crystalens premium IOL’s so easily using the Consult presentations.”

Refractive Practice – Santa Barbara, CA

Consult Screen — SUNRISE LASER CENTERS (localhost) |
File Edit Letters Print Reports Setup Help Admin

New Client Recall Records Find Client Save Record Client History Place Call Incoming Call Sched. Activity Pending Tasks Quit

Consult
by Patient Concepts

Client **JONES, MARY** Gender Female Counselor **DAVID KRIER**

Address 235 MAPLE ST Office SUNRISE VAN NUYS
City CAMARILLO State CA Zip 93010 Doctor DR. BILL JOHNSON

Phone Hm. 888-555-1212 Wk. 888-555-1234 X Cell 888-555-2356 Co-Managed

Email mjones@someisp.net

Category LASIK - Sta

Discount NOVEMBER SPECIAL

Cash Discount 3 %

Date Option 1 11/11/2008 Date Option 2 11/13/2008

Surgery Initial Date 11/04/2008

Sources Procedure Outcome

Add Note Edit Delete

Activity	Comment	Counselor	Date	Time	Completed	Status	Result
SCRIPT CALL	APPOINTMENT CONFIRMED	DAVID KRIER	11/04/2008	4:39 PM	11/04/2008 4:38 PM	ALL COMPLETE	APPT CONFIRMED
NOTE	STATUS CHANGED						
	STATUS CHANGED FROM: INQUIRY						

Patient Concepts
Toll Free: 877-670-7602 or 805-987-2020
www.patientconcepts.com